

0. This coversheet generated by:

- A. ☐ Green "Panel/X-Section Coversheet"
- B. ☐ An HU structure added to Listing Sheet and selected for this study
- C. ☐ An Added HU found at a listed and selected Line

Sample ID is:		--		--		--		--	
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Interviewer's Label

1. Sample Address--Unique Address or Description:

**Sample Location:**

3. Your IW No.

7. Total Calls (Call # of Final Call)

4. Length of IW (Minutes)

8. Date of Final Result

5. Length of Edit (Minutes)

### 9. Final Result Code

6. Pers. Ltr Req.? ☐ 5. NO ☐ 1. YES--> (Date) 9a. Mode of Iw: ☐ 1. F-t-F ☐ 2. TEL

REMEMBER TO COMPLETE OBSERVATION SECTION AND THUMBNAIL SKETCH

OWER: COMPLETE ITEM 10 BELOW IF BOX B IS MARKED AT ITEM 0

10. THE ADDRESS OR DESCRIPTION ON THE SAMPLE LABEL ABOVE WAS FOUND TO HAVE: (CHECK ONE)

1 HU	2 HU's	3 HU's	4 HU's	5 OR MORE HU's	--->	Do not attempt any interviews. Obtain HU locations within the structure and call your supervisor.
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HU 1 is uniquely described by adding to the sample address on the label the following description about the location of HU 1 in the structure:

The unique and complete address or description for each of the additional HU's is (use street address/  
description and location of HU in the structure:

HU 2: □□-□□-□□-□-□

HU 3: □□-□□-□□-□-□

HU 4: □□-□□-□□-□□-□□

Make out an unlabelled coversheet for each of the additional HUs. Attempt an interview at HU 1 and at each of the additional HU's. Call your supervisor later to obtain a sample ID for each of the additional HU's. Record the ID's on the respective lines above. Enter the ID in Box 0 of the unlabelled coversheet for each added HU(s). Be sure to add these ID's to your SAS.

11. Hello, my name is \_\_\_\_\_, and I work for The University of Michigan's Survey Research Center. Here is my identification (SHOW ID). The University of Michigan is conducting a study throughout the country and we are interested in the financial situations of households in the United States. This address was selected as part of the study's sample, and I may need to interview someone here. **TURN TO P. 8, ITEM 13, HOUSEHOLD LISTING.**

12. CALL RECORD

[illegible]

Z1. INTERVIEWER CHECKPOINT: RESPONDENT: EMPLOYER/PENSION/SOCIAL SECURITY NUMBER

- ☐ 1. R IS COVERED BY A PENSION FROM CURRENT JOB (BOX 1 CHECKED AT Y42)
- ☐ 2. ALL OTHERS, (BOX 2 CHECKED AT Y42)--->GO TO Z3--BOTTOM OF THIS PAGE

Z2. I need to get just a few more pieces of information before I leave. In order to obtain the latest available information about the retirement benefits that people with work experience like yours are entitled to, we would like to contact the employer who will be providing your primary pension. For this purpose, we need know the name and address of the employer, or other organization, that provides primary pension you expect to receive.

Z2a. EMPLOYER NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_ / \_\_\_\_\_  
NUMBER AND STREET CITY, STATE AND ZIP CODE

Z2b. PENSION PROVIDER (IF DIFFERENT): \_\_\_\_\_

ADDRESS: \_\_\_\_\_ / \_\_\_\_\_  
NUMBER AND STREET CITY, STATE AND ZIP CODE

Z2c. ☐ REFUSED (EXPLAIN): \_\_\_\_\_

Z2d. What is the official title of the job from which you expect to receive your prim pension?

\_\_\_\_\_ OFFICIAL JOB TITLE

Z2e. In order to get complete information on the adequacy of pension and retirement income and to examine health care benefit information of households in our sample we would like to know your Social Security Number...(what is your Social Security Number?)

SOCIAL SECURITY NUMBER 

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Z2f. ☐ REFUSED (EXPLAIN): \_\_\_\_\_

**NEXT PAGE, Z4**

Z3. The Survey Research Center would like to obtain the latest available information about the retirement and health benefits that you and others like you can expect receive. For this reason, we would like to know your Social Security Number...(what is your Social Security Number?)

SOCIAL SECURITY NUMBER 

--	--	--	--	--	--	--	--	--	--

Z3a. ☐ REFUSED (EXPLAIN): \_\_\_\_\_

**NEXT PAGE, Z4**

25. We would also like to obtain information about the retirement benefits that people with work experience like your (husband/wife) are entitled to receive. (In order to do this, we would like to contact the employer who will be providing (his/her) primary pension.) For this purpose, we would like to know the name and address of the employer, or other organization, that provides the primary pension that (he/she) expects to receive.

Z5a. EMPLOYER NAME: \_\_\_\_\_

Z5b. PENSION PROVIDER (IF DIFFERENT): \_\_\_\_\_

Z5c. REFUSED (EXPLAIN):

OFFICIAL JOB TITLE

SOCIAL SECURITY NUMBER     |     |     |     |     |     |     |     |     |

Z5f. REFUSED (EXPLAIN):

**26.** (The Survey Research Center would like to obtain the latest available information about the retirement and health benefits that your [husband/wife] and others like [him/her] can expect to receive.) (For this reason,) we would like to know your (husband's/wife's) Social Security Number... (what is [his/her] Social Security Number)?

SOCIAL SECURITY NUMBER     |     |     |     |     |     |     |     |

Z6a. REFUSED (EXPLAIN):

NEXT PAGE, R1

## RECONTACT INFORMATION

R1. Thank you very much for this interview. We value people like you who are willing to contribute their experiences to our research. We will be sending you a report of some of our findings as a way of expressing our appreciation for your cooperation. Our Regional Supervisor may also be calling or writing you to verify this interview. For these reasons I would like to ask for your name, address and telephone number.  
**(FOR WOMEN OBTAIN THEIR FIRST NAME, NOT THEIR HUSBAND'S FIRST NAME.)**

R1a. What is your full legal name as it appears on official documents such as your voter's registration, Social Security Card, or driver's license? (IWER: VERIFY SPELLING OF R'S FULL NAME AND WRITE CLEARLY.)

TITLE:	MR	MRS	MISS	MS	DR	REV	NAME REFUSED
<div> <div> <div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div> </div> <div> <div></div><div></div> </div> <div> <div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div> </div> </div>							
FIRST NAME				MIDDLE INITIAL		LAST NAME	

R1b. What is your address?

[illegible]

R2. INTERVIEWER CHECKPOINT: ADDRESS AT R1b ABOVE IS:

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graph TD
    A["1. IDENTICAL TO SAMPLE  
LABEL ADDRESS"] --> B["GO TO R4"]
    C["2. CORRECTED VERSION OF  
SAMPLE LABEL ADDRESS"] --> D["GO TO R4"]
    E["3. DIFERENT FROM SAMPLE  
LABEL"] --> F["↓"]
    
```

R3. Is this a mailing address for your home, an address you will be moving to, a relative's address, the address of a friend, a business address, or what?

1. MAILING ADDRESS	2. ADDRESS TO WHICH R IS MOVING	3. RELATIVE	4. FRIEND	5. BUSINESS	7. OTHER: _____
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R4. And, what is your telephone number?

			-			-				R HAS NO PHONE	PHONE NUMBER REFUSED
AREA CODE				TELEPHONE NUMBER							

NEXT PAGE, R6

R4a. (IF R MARRIED): What is your (husband's/wife's) full legal name?

FIRST

MIDDLE INITIAL

LAST

R5. Is your phone number listed in the current telephone directory?

1. YES, LISTED

5. NO, NOT LISTED

8. NOT SURE, DON'T KNOW



GO TO R6

R5a. Is your phone listed in your name?

1. YES

5. NO

---->

R5b. In whose name is the phone listed? (What relation is this person to you?)

NAME

RELATIONSHIP



R6. Do you have another place of residence or somewhere else you live during different times of the year?

1. YES

--->

R6a. We may wish to contact you at your other residence. May I have the address and phone number?

5. NO

STREET ADDRESS

ADDRESS REFUSED

CITY

STATE

ZIP

(AREA CODE)

NUMBER

R HAS NO PHONE

PHONE REFUSED



R7. If for any reason we should have difficulty contacting you, could you give me the name, address, and telephone number of a close friend or relative who will know how to get in touch with you? (And what is this person's relationship to you?)

NAME: \_\_\_\_\_

RELATIONSHIP TO R: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_

R8. IF R REFUSED ANY RECONTACT INFORMATION: WHAT IS YOUR UNDERSTANDING OF THE REASON(S) THE INFORMATION WAS REFUSED?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# NONINTERVIEW FORM

This form MUST be completed for each coversheet finalized as a Noninterview.

Coversheets finalized as Nonsample do not need to have a Noninterview Form completed.

NI1. Did you ever have any contact with the respondent?

1. YES

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5. NO ---> GO TO NI3
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↓

NI2. Did R refuse initially?

1. YES

5. NO --->

NI2a. Did R break any appointments?

0. NONE

1. ONE

2. TWO OR MORE

A horizontal beam is shown with a downward-pointing arrow indicating a point load at its center. The beam is supported by two vertical supports, one at each end.

NI2b. If there was any resistance from the respondent, what were the reasons given?  
(CHECK ALL THAT APPLY.)

A. SURVEYS WASTE OF  
TIME; PREVIOUS  
BAD EXPERIENCE

B. VERY  
ILL

C. 'TOO  
BUSY'

D. STRESSFUL  
FAMILY  
SITUATION

E. CONFIDENTIALITY

#### F. INVASION OF PRIVACY

G. NO REASON  
GIVEN

H. OTHER:

---

NI3. Describe here IN DETAIL any interactions you had with the respondent or informant(s) that will help us understand finalizing this coversheet as a Noninterview. Examples of the kind of information we need are attempts made at persuasion--letters, visits, coversheet transfers, excuses/reasons R gave for not participating.

[illegible]

[illegible]

CONTINUE ON A SUPPLEMENTAL CALL RECORD IF NECESSARY

